20 de marzo de 2013

R-1213-23 (ENMENDADA R-1112-35)
SEÑORAS RECTORAS Y SEÑORES RECTORES

Miguel A. Muñoz, Ph.D.

ACTUALIZACIÓN DE PROCEDIMIENTO PARA LA PREPARACIÓN DE LOS INFORMES DE TIEMPO Y ESFUERZO EN EL SISTEMA UNIVERSITARIO

Someto, para su inmediata consideración y acción pertinente, la versión actualizada de la circular R-1112-35, la cual establece el Procedimiento para la Preparación de los Informes de Tiempo y Esfuerzo en el Sistema Universitario, diseminada el 8 de junio de 2012. Las enmiendas responden a recomendaciones planteadas por la National Science Foundation en su comunicación del 1 de febrero de 2013.

Todas las unidades que tengan proyectos subvencionados por el Gobierno Federal deben tomar las medidas necesarias para llevar a cabo este proceso, de forma tal que estemos en cumplimiento con la reglamentación federal aplicable. Esta circular debe ser referida a todas las oficinas que intervienen en el proceso para la preparación y radicación de los Informes de Tiempo y Esfuerzo.

Cualquier duda relacionada a este proceso debe ser dirigida a la Vicepresidencia de Investigación y Tecnología de la Administración Central.

Saludos cordiales.

sdr

Anejos
UNIVERSITY OF PUERTO RICO SYSTEM

PROCEDURES FOR THE PREPARATION AND SUBMISSION OF TIME AND EFFORT REPORTS
(Amended) March 2013

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I. LEGAL BASIS


II. DEFINITIONS

In the application of these rules and procedures, the following terms are defined as follows:

A. Faculty – University employee with an academic appointment.

B. Professional Personnel - Employees that require specialized academic preparation, and in some cases, a license or permit, to practice their profession.

C. Non-Professional Personnel – Employees that do not require specialized academic preparation to carry out their job functions, acquiring the necessary training and experience through their service.

D. Effort. Effort is expressed as a percentage of the total amount (100%) of professional effort expended on University activities for which an institutional base salary is paid.

E. Institutional Base Salary - For Faculty Personnel dedicated to academic instruction, who also conduct research, creative activity, teaching improvement, training, and/or services, is defined to be their annual permanent salary as it appears in the employment contract of the employee or subsequent letters of notice of salary increase/decrease plus any supplemental compensation of one full year or more. This annual permanent salary constitutes the base pay for the individual’s total professional effort (100%), independent if his/her time is devoted to teaching, research, administration, creative activity, service, clinical activities, other activities and/or a combination of these, and in conformity with the provisions contained in Articles 49 and 66 of the General Rules of the University of Puerto Rico.

F. Cost Sharing - cost sharing occurs when a portion of the total costs of a sponsored project are borne by the University, not the sponsor. Cost sharing/matching requirements may be in the form of an actual cash expenditure of funds, or may be an “in-kind” match, which is the value of non-cash contributions to the project (for example, a faculty or personnel percent effort commitment to a sponsored project/program).

III. GENERAL RULES

Compliant to OMB Circular A-21, the University engages the After the Fact methodology for initially charging federally sponsored agreements based on factors of an individual’s effort commitment to sponsored agreements and the forecast of the individual’s total University workload in relation to the individual’s defined institutional base salary. Subsequent changes that are considered significant such as the addition or reduction of sponsored agreements to an individual’s workload are made to reflect the best estimate of expected actual results. At the end of each semester or semi-annual period, forms are generated depicting the initial effort expended for an individual having charged labor and/or cost shared on a sponsored
project for the period. The effort profile presented is based on the payroll charged related to the individual's institutional base salary for the period and should represent by account 100% of the individual's sponsored and non-sponsored activities.

Each report is reviewed, changed when appropriate to reflect a reasonable estimate of the actual effort expended in relation to the charges for the period, and signed by the appropriate official(s) having suitable means of verification. Labor cost transfers should be made to ensure payroll charged is aligned with the effort certified. The following procedures are provided for accomplishing the charging, reporting and certification of effort for faculty, professional and non-professional employees.

A. Required Personnel, Frequency and Process

1. Faculty and professional personnel charged and/or cost shared to federally sponsored projects, including research, training or any other sponsored agreement.
   a. Initially, the individual's institutional base salary (IBS) is defined to be their annual permanent salary as it appears in the employment contract of the employee or subsequent letters of notice of salary increase/decrease plus any supplemental compensation of one full year or more. When there is a change in the IBS, supplemental pay, and/or account distribution, a Human Resources ORH-T002 Personnel Transaction Form is required to be completed by the department initiating the change that includes the base salary, status of the individual (part/full time) and the account to charge where a subsequent change is made. This document is the vehicle recognized by the Payroll Department to pay an individual and charge final cost objectives.

   i. Additionally, Form 125A – Report for Establishing Payroll Distribution (refer to Attachment 1) must be completed summarizing all commitments the covered individual has as well as the accounts and pay listed on the ORH-T002 - Personnel Transaction Forms. Form 125A is used to present the individual's new 100% account profile and total pay. Form 125A is also used to obtain all necessary approvals. Both documents together when sent to the Human Resources Payroll Department establish the amount that will be charged to applicable projects prospectively based on estimates to reflect devoted effort. These forms are required to be completed within a reasonable time (no more than 60 days) from the beginning of the academic year, when an individual is newly appointed and/or when significant changes such as the addition or reduction of sponsored agreements to reflect a reasonable estimate of expected effort actual results. Estimates are based on factors of an individual's effort commitment to sponsored agreements and the forecast of the individual's total University workload in relation to the individual's defined institutional base salary. Compensation that is non-effort related may not be included in the institutional base salary for determining
estimates chargeable to federally sponsored awards unless prior approval has been obtained from the sponsor. According to OMB A-21 in unusual cases where consultation is across departmental lines or involves a separate or remote operation, and the work performed by the consultant is in addition to his regular departmental load, any charges for such work representing extra compensation above the base salary are allowable provided that such consulting arrangements are specifically provided for in the agreement or approved in writing by the sponsoring agency.

Refer to Appendix 1 for examples on estimating effort commitments in relation to the institutional base salary.

ii. Form 125A must be accompanied with the supporting details using the ORH-T002 Personnel Transaction Form and submitted to the Campus Finance Office. The Finance Office at each campus will review Form 125A to ensure the accounts and amounts to charge are appropriate. Additionally, a review of the NSF requirement for faculty not to exceed 2/9 of salary for nine months contracts, unless approved by the agency. If the intended Form 125A for the faculty and/or professional personnel is not in accordance to the grant award, the Finance Office will return the completed Form 125A to the individual and their supervisor for correction before labor charges are initiated. Otherwise Finance submits to the Campus Human Resource Department for entry into the Payroll system by the Campus Payroll Office.

iii. The Payroll Office or its equivalent at each campus is responsible for input of the ORH-T002 Personnel Transaction Form, which supports and is summarized on Form 125A, into the University’s payroll system.

b. Effort Reports. Every six months for all employees under a 12 months appointment schedule and at the end of each academic and summer term for all employees under a 9 or 10 months appointment schedule, following the certification schedule. The University’s Effort Reporting Central Administrator will generate Form 125B - Time and Effort Certification Report (refer to Attachment II) using payroll charged percentages for the period to depict the actual effort expended. Form 125B must represent 100% of an individual’s effort profile (sponsored and non-sponsored activities across all campuses) based on labor charges related to the institutional base salary and/or commitments by funding source for the period reviewed. The distribution of time and effort dedicated to distinct projects and programs for sponsored and non-sponsored activities will be on a percentage basis and must sum to 100%. The reports will be made available to the campuses and departments for review, update and certification. The certifier should review Form 125B to ensure it represents the effort devoted for each activity for the period. Forms updated requiring labor cost transfers to appropriately align payroll charges with the actual effort expended must be executed
immediately. Form 125B should be completed and certified by the employee or an official designed for this task. Applicable labor cost transfers must be executed within the first sixty (60) days after the forms are available according to the following schedule:

<table>
<thead>
<tr>
<th>Period Covered</th>
<th>Forms Availability Date</th>
<th>Certification Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>January, 15th</td>
<td>March 15th</td>
</tr>
<tr>
<td>Spring</td>
<td>July 15th</td>
<td>September 15th</td>
</tr>
<tr>
<td>Summer</td>
<td>August 30th</td>
<td>October 30th</td>
</tr>
</tbody>
</table>

If the Certification deadline is a weekend day or a Holiday the deadline will be the next working day.

i. Certification. Form 125B will be signed by the covered named individual of Form 125B or an official(s) having suitable means of verification that is personally familiar with the activities and work done by the covered named individual for the period reported, and that possess sufficient technical knowledge that they can identify the covered named individual’s effort in each project or program.

ii. The directors of departments, offices and/or programs and deans, each one at their respective level of responsibility, will ensure that the personnel under their supervision submit timely reports; reports are properly completed and signed by officials having suitable means of verification; and will apply disciplinary measures, consistent with the situation, when there is a lack of compliance.

iii. The Finance Office at each campus will maintain the originals of Form 125B Time and Effort Reports for all faculty and professional personnel under their jurisdiction. The Finance Office and/or Sponsored Program Office at each campus will be responsible to ensure all Form 125B are completed accurately, submitted timely, and are in accordance with University Effort Reporting policies and procedures. Additionally, the Finance Office at each campus will maintain control of all financial accounts of federal funds under their jurisdiction.

2. **Non-professional personnel** will use time sheets to record actual time on projects and submit monthly for payroll and charge to University activities. Timesheets are maintained at each Human Resources campus office. Where time sheets are not available or do not identify time to specific federal projects, Form 125B will be required for certification on a semester basis required for professional personnel.
IV. SPECIAL RULES FOR PERSONNEL THAT RECEIVE FUNDS FROM MULTIPLE AWARDS FROM MORE THAN ONE UNIVERSITY OF PUERTO RICO CAMPUS

The University of Puerto Rico has faculty and professional personnel that can and may receive federal salary support from sponsored agreements located at campuses other than his/her home campus or from multi-campus proposals. For these cases, the following additional rules apply:

A. The initiating Campus Department. Initiating a change for an individual outside of their campus requires an authorization from the Chancellor’s Office of the home campus department of the individual to determine if the individual can devote effort and be paid from the sponsored agreement as released time of the individual academic period effort or as summer salary. Once approved, the base campus department will complete ORH-T002 Personnel Transaction Form which will indicate the new account to charge. The Finance Office of the initiating campus or its equivalent will process a transfer of funds to the base campus to cover the authorized effort. Again, initial payments based on estimates should take into account the commitment and expected effort to devote to the sponsored project for the timeframe being paid. Additionally, Form 125A must be completed by the requesting campus with the assistance of the covered named individual or official that lists 100% of the individual’s new account distribution. To accommodate the new sponsored project, a corresponding drop in effort and pay must be made to maintain the base salary. Form 125A is signed in the section Approval from Supra-Campus Projects Directors. The original completed Form 125A is sent to the home campus department of the covered named individual for further review and approval.

B. The Home Campus Department of the Covered Named Individual. The home campus department must review to ensure the distribution completed by the initiating campus department is completed appropriately and accounts for 100% of the individual’s distribution. Once approved in the section entitled “Approval”, the home campus department should complete ORH-T002 – Personnel Transaction Form to reduce the covered named individual’s pay to the appropriate account(s) to offset the requested campus department’s sponsored project. The original ORH-T002 completed by the home campus department is sent to the home campus department’s Human Resource Office for entry into the payroll system by the Payroll Office. A copy of the signed Form 125A along with a copy of the campus home department’s ORH-T002 should be sent to the requesting campus department and copies sent to the home campus department’s Sponsored Research Office or equivalent. The original Form 125A and the ORH-T002 completed by the home campus department is sent to the home campus department’s Human Resource Office for entry into the payroll system by the Payroll Office.
C. If the effort will be devoted during the summer period, the home campus should send the approved 125A to the initiating campus department. The initiating campus will prepare and send Form 125A and an original ORH-T002 to their respective Human Resources Office for entry into the payroll. If the individual has summer month’s commitments in more than one campus, the home campus should keep an original Form 125A and a copy should be sent to the initiating campus with the corresponding ORH-T002. Both documents will be sent to their respective Human Resources Office for entry into the payroll.

V. INSTRUCTIONS FOR PREPARING AND PROCESSING OF TIME AND EFFORT FORM 125A and 125B

A. Form 125A – Report for Establishing Payroll Distribution: The following procedures will be followed with respect to establishing estimates to initially charge sponsored and non-sponsored projects:

1. Faculty and Professional Personnel with the assistance of Department Administrators and their respective Finance Office will complete the form to charge payroll as needed to appropriate projects/accounts.

2. An original shall be forwarded to each of the projects or programs to which the employee or official has rendered services and to the Chairperson, Dean or other official of the appropriate institution to which the employee is ascribed.

3. The spaces and columns will be completed as follows:

   The upper part shall indicate the name of the campus or institutional unit. The remaining spaces are provided for the following information
   
   a. Employee Name – indicate the name of the employee or official.
   
   b. Social Security – fill in the social security number of the employee or official, showing only the last four digits.
   
   c. Department/Faculty – indicate the department/faculty of the employee.
   
   d. Position – refers to the title or position that the employee or official holds.
   
   e. Base Salary – Indicate the individual’s Base Salary considered as their IBS.
   
   f. Indicate if the employee is faculty, professional, non-professional or clerical.
   
   g. Effective Date of Payroll Distribution – indicate the begin date of the distribution.
   
   h. Indicate if the employee has multi-campus and/or projects funded by other campuses of the UPR (Yes or No).

   In the section Sponsored Accounts, indicate and/or review the following:
   
   i. Campus of the Account – campus that owns the account of the project.
   
   j. Account Number – 32 digit account number from where a payment will be received.
   
   k. Cost category/Major function and Project Title – cost category or major function, and title of the project or program on which the employee or official will work and be paid.
I. Level of Effort % - the commitment or estimated effort that is expected to resemble actual effort devoted.

m. Amount to be charged to Account – according to the committed level of effort % and the period in which effort will be devoted and based on the institutional base salary. Non-IBS labor charges are not allowed to be charged to federally sponsored accounts.

In the section Cost Sharing or Matching Funds, review the same columns previously defined above for the section Sponsored Accounts.

In the section University Funds, review the following columns:

n. Campus of the Account – campus that owns the account of the project.
o. Account Number – 32 digits account number from where a payment will be received.
p. Type of Activity Funded by UPR – functional activity, that is, instruction, department research, administration, etc.
q. Level of Effort % - the estimated effort that is expected to resemble actual effort devoted.
r. Amount to be Charged to Account – according to the committed level of effort % and the period in which effort will be devoted and based on the institutional base salary. Note that incidental and/or compensation that is not considered base pay should be included in the section “Payments Paid for other work not included in the Base Salary” with the proper approvals of the department/chair/dean. Provide an explanation in the Comments section of the Form for compensation not considered base salary.
s. Total Compensation – total the amount that will be charged to Sponsored and University Funds.
t. Comments – indicate comments related to the information that is included in the form.
u. Approval Section: In the spaces provided, the following personnel must sign the form: the employee or official that completed the form, the Home Department Approver if applicable, and the Project Director(s) of the home campus of the covered named individual. All signatures must be dated as well.
v. Approval From Supra-Campus Projects Directors: Provide the Employee’s signature and date, the campus of the Project Director(s), the signature of the Supra-Campus Project Director(s) from which the covered named individual receives compensation and the date.
w. Finance Office Use Only - A finance Office official should verify the information and sign and date the form.

Submission/Routing

1. Once signed by the employee or official, an original will be sent to the director or supervisor of the project or program and to the Chairperson and Dean of the appropriate institution or Home Department Approver to which the employee is ascribed; the employee or official should retain a copy.
2. After the form has been signed by the director or supervisor of the project or program and by
the corresponding Dean or Director, the Finance Office signature is also required.

3. The original along with ORH-T002 will be sent to the Human Resource Office for input to the
payroll system with copies sent to the Finance Office and the Sponsored Research Office for
filing.

B. Form 125B - At the end of academic or summer period, the following procedures will be
followed with respect to certifying an individual’s reasonable estimate of actual effort expended:

1. Faculty and Professional Personnel will review the form for accuracy and certification.
Employees under a 12-months schedule will submit the form every six months and employees
with 9 or 10 months schedule will submit the form for each semester and for the summer
period according to the certification schedule.

2. The original Time and Effort form shall be submitted to the Finance Office of the
 corresponding institutional unit within the first sixty (60) days following the availability of
forms as described in the certification schedule.

3. The spaces and columns will be updated/corrected as follows if after review of the pre
populated 125B Forms from the University’s Central Effort Administrator accounts/activities
are missing and/or other changes are required to reflect a reasonably accurate effort form:

   In the section Sponsored Accounts, review and update if needed the following:
   a. Campus of the Account – campus that owns the account of the project.
   b. Account Number – 32 digit account number effort was expended on.
   c. Cost category/Major function and Project Title – cost category or major function, and
      indicate the title of the project or program on which the employee or official devoted
      effort and paid.
   d. Level of Effort % - the actual effort expended.
   e. Amount Charged to Account – the level of effort % multiplied by the individual's
      proportional institutional base salary for the corresponding period. Non-IBS labor charges
      are not allowed to be charged to federally sponsored accounts.

   In the section Cost Sharing or Matching Funds, complete the same columns previously defined
above for the section Sponsored Accounts.

   In the section University Funds, review and update if needed the following columns where
appropriate:
   f. Campus of the Account – campus that owns the account of the project.
   g. Account Number – 32 digit account number for the expended effort.
   h. Type of Activity Funded by UPR – functional activity, that is, instruction, department
      research, administration, etc.
   i. Level of Effort % - actual effort expended.
UNIVERSITY OF PUERTO RICO SYSTEM
PROCEDURES FOR THE PREPARATION AND SUBMISSION OF TIME AND EFFORT REPORTS
(Amended) March 2013

j. Amount Charged to Account—the level of effort % multiplied by the individual's proportional institutional base salary for the corresponding period. Note, incidental and/or compensation not related to effort should not be considered here.

k. Total Effort and Base Salary—total the Effort Percentage which must sum 100% and the Amount Charge to Account, which must be proportional to the institutional base salary for the corresponding period.

l. Comments—indicate comments related to payroll adjustments that must be made if the Effort % was changed from the pre-populated amount(s). A cost transfer must be processed by the campus Finance Department to align the effort profile with the labor costs charged.

m. Certification: The employee's signature is required and/or the Certifier (one who has suitable means of verification that the work was performed and the effort is reasonably accurate for the period) if the employee is not available.

Submission/Routing

1. After the form has been signed by the employee or in his/her absence, by the director or supervisor of the project or program (the Certifier), the original will be sent to the Finance Office of the institutional unit; the copy will be retained by the director or supervisor of the project or program.

2. The Finance Office of the institutional unit will execute applicable labor cost transfers and maintain the signed original 125B.

VI. Related Information

A. Circular R-1112-21 Norms For the Promotion and Development and of Research and Effort Reporting Policies Stated In Certifications 14 and 15 (2011-12) of the Board of Trustees for Faculty

B. Certification Number 14 – Policy for the Promotion and Development of Research at the University of Puerto Rico

C. Certification Number 15 – Effort Reporting Policies and Procedures at the University of Puerto Rico

D. Certification Number 16 – Cost Sharing/Matching Funds Policies and procedures at the University of Puerto Rico

VII. Attachments

A. Form 125A – Time and Effort Report for Establishing Payroll Distribution

B. Form 125B – Time and Effort Certification Report

VIII. Appendix I – Examples of Estimating Payroll Charges and Effort (To be Developed)
Form 125A
University of Puerto Rico
Unit: 
Report for Payroll Distribution

Employee Name
Department/Faculty
Social Security
Position
Faculty ( ) Professional ( ) Non-Professional ( )
Base Salary
Appointment Type: 9 month ( ) 10 months ( ) 12 months ( )

EFFORT REPORT PERIOD: Fall ( ) Spring ( ) Summer ( ) Year ( ) Amended

Effective Date of Payroll Distribution:

Multi-campus and/or Projects funded by campuses other than the home campus of the professor Yes ( ) No ( )

If the answer is "Yes" the form will require the signature of the supra-campus projects Directors. See section below.

<table>
<thead>
<tr>
<th>CAMPUS</th>
<th>ACCOUNT NUMBERS</th>
<th>COST CATEGORY/ MAJOR FUNCTION AND PROJECT TITLE</th>
<th>PERIOD OF PERFORMANCE</th>
<th>LEVEL OF EFFORT</th>
<th>AMOUNT</th>
<th>TO BE CHARGED</th>
<th>ACCOUNT</th>
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</thead>
<tbody>
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</table>

<table>
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<th>ACCOUNT NUMBERS</th>
<th>COST CATEGORY/ MAJOR FUNCTION AND PROJECT TITLE</th>
<th>PERIOD OF PERFORMANCE</th>
<th>LEVEL OF EFFORT</th>
<th>AMOUNT</th>
</tr>
</thead>
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<tr>
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<td></td>
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<td>BEGIN – END</td>
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<td>MM/DD/YYYY</td>
<td>MM/DD/YYYY</td>
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</tbody>
</table>

TOTAL COMPENSATION 100%

PAYMENTS PAID FOR OTHER WORK NOT INCLUDED IN THE BASE SALARY

<table>
<thead>
<tr>
<th>Account Numbers</th>
<th>Type of work performed</th>
<th>AMT. Paid</th>
</tr>
</thead>
</table>

COMMENTS

APPROVALS

Employee Signature ___________________________ Date ___________ ___________________________ Date ___________

Home Department Approver ___________________________ Date ___________ ___________________________ Date ___________

Home Deanship Dean ___________________________ Date ___________ ___________________________ Date ___________

Home Campus Chancellor ___________________________ Date ___________ Project Directors of the Home campus of the faculty member ___________________________ Date ___________

APPROVAL FROM SUPRA-CAMPUS PROJECTS DIRECTORS

<table>
<thead>
<tr>
<th>Campus of Project Director</th>
<th>Supra-Campus Project Director(s) from which the faculty receives compensation Date</th>
<th>Campus of Project Director</th>
<th>Supra-Campus Project Director(s) from which the faculty receives compensation Date</th>
</tr>
</thead>
</table>

FINANCE OFFICE USE ONLY

Revised by: ___________________________ Date ___________

Form 125A is to be complete by the above officials to estimate effort and compensation for the applicable period.
Form 125B
University of Puerto Rico

Time and Effort Certification Report

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Social Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department/Faculty</td>
<td>Position</td>
</tr>
<tr>
<td>Faculty</td>
<td>Professional</td>
</tr>
<tr>
<td>Appointment Type: 9 month</td>
<td>10 months</td>
</tr>
<tr>
<td>EFFORT REPORT PERIOD:</td>
<td>Fall</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPONSORED ACCOUNTS</th>
<th>CAMPUS OF THE ACCOUNT</th>
<th>ACCOUNT NUMBERS</th>
<th>COST CATEGORY/MAJOR FUNCTION AND PROJECT TITLE</th>
<th>LEVEL OF EFFORT %</th>
<th>AMOUNT CHARGED TO ACCOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>COST SHARING</td>
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<td></td>
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</tr>
<tr>
<td>UNIVERSITY FUNDS</td>
<td>CAMPUS OF THE ACCOUNT</td>
<td>ACCOUNT NUMBERS</td>
<td>COST CATEGORY/MAJOR FUNCTION AND PROJECT TITLE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TOTAL EFFORT AND BASE SALARY 100%

COMMENTS REGARDING PAYROLL ADJUSTMENTS

CERTIFICATION
I certify that this distribution of activity represents a reasonable estimate of the effort spent during the period covered by this report.

Employee’s signature Date

In the case the covered name individual is not available at the time this report is due, one having suitable means of verification shall certify this form.

Certifier Date

FINANCE OFFICE USE ONLY
I certify that the amounts charged to federally funded activities of the projects represent the actual costs according to the effort devoted and payroll information.

Audited by Date

Please note:
• Form 125B must be reviewed and if needed, adjusted appropriately to reflect a reasonable estimate of actual effort, and certified.
• Adjustments made to the level of effort % from the pre printed form may require a salary cost transfer be made to ensure salaries charged agree with the level of effort % certified.